

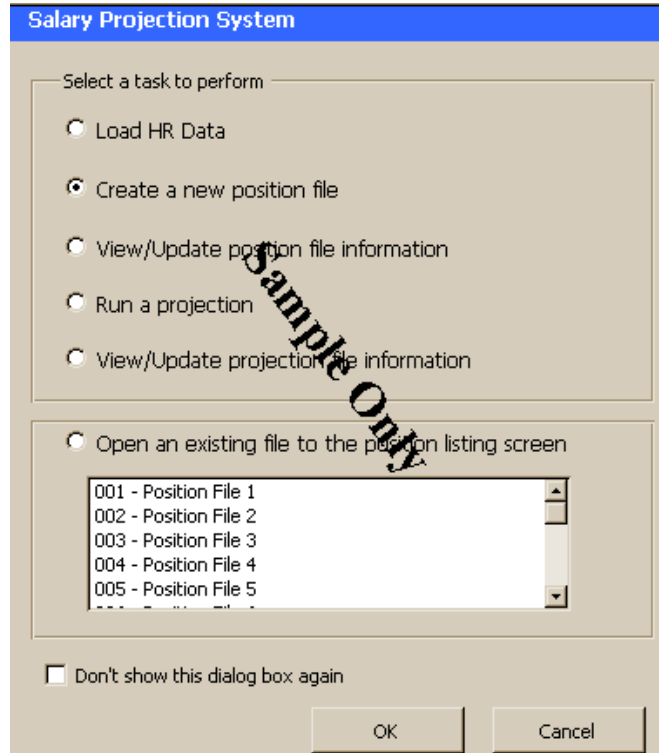
Salary Projection System Early System Demonstration February 19, 2003

I. Small Agency Demonstration

A. Start SPS

Startup dialog box not available for the demonstration. This dialog box allows the user to determine where to navigate to upon entering the SPS system. It replaces the yellow menu available in BDS and CBS. Further system navigation occurs through the SPS menu bar.

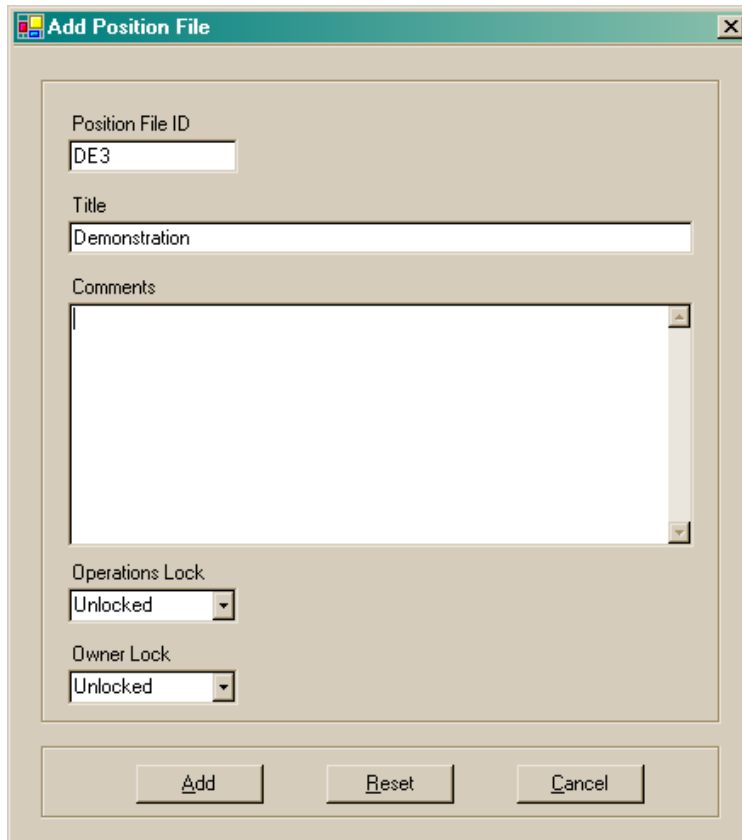
Sample –



The image shows a screenshot of the 'Salary Projection System' startup dialog box. The window has a blue title bar with the text 'Salary Projection System'. Inside the window, there is a section titled 'Select a task to perform' with five radio button options: 'Load HR Data', 'Create a new position file' (which is selected), 'View/Update position file information', 'Run a projection', and 'View/Update projection file information'. Below this section is another radio button option: 'Open an existing file to the position listing screen'. Under this option is a list box containing five entries: '001 - Position File 1', '002 - Position File 2', '003 - Position File 3', '004 - Position File 4', and '005 - Position File 5'. At the bottom of the dialog box, there is a checkbox labeled 'Don't show this dialog box again' which is currently unchecked. To the right of the checkbox are two buttons: 'OK' and 'Cancel'. A large, diagonal watermark reading 'Sample Only' is overlaid across the center of the dialog box.

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B. Add Position File



The screenshot shows a Windows-style dialog box titled "Add Position File". It contains the following fields and controls:

- Position File ID:** A text box containing the value "DE3".
- Title:** A text box containing the value "Demonstration".
- Comments:** A large, empty text area for additional information.
- Operations Lock:** A dropdown menu currently set to "Unlocked".
- Owner Lock:** A dropdown menu currently set to "Unlocked".
- Buttons:** Three buttons at the bottom: "Add", "Reset", and "Cancel".

Users must first add a position file in order to load HR data, add position records, or copy position records to the new file ID.

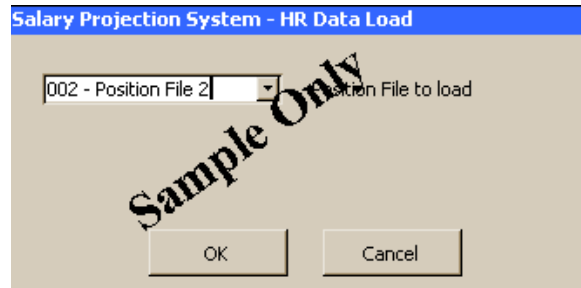
Locking abilities exist for all positions files. An Operations lock allows budget operations to lock users with edit access out of making changes to a position file. The owner lock allows a position file owner to lock out other agency SPS users with edit access from making changes.

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C. Load HR Data

HR Data Load selection screen not available for demonstration.

Sample only -



D. Go to Position Listing

The list format displayed here is temporary for the demonstration. BASS is currently evaluating the option of using third party software for making "grids" in SPS. The actual presentation of the list may vary depending on what the team decides to proceed with, but the functionality will remain much the same.

Position listing allows the user to see a list of positions prior to making changes to the file. The user will select the file to view, then click the "load" button.

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SPS - DV - Position Listing

File Tools Edit View

Position Listing

Position File ID:

100 - February 19th Demo Load

Pos. #	Start Date	Name	Job Cl...	Job Title	R...	S...	Salary
0001	1/15/1997	Employee 489462	EX002				8309
0002	1/15/1997	Employee 90074	EX203				10172.58
0003	8/7/1998	Employee 458226	EX202				8480.33
0019	7/1/2002	Employee 306718	WMS...	WMS BAND 2			4956
0024	9/3/2002	Employee 232497	WMS...	WMS BAND 2			5438
0025	1/1/1900	Employee -1	EX051	CONF. SECRETARY			0
0027	10/5/1999	Employee 427298	01300	PUBLICATIONS SPE	36	K	2775
0029	5/1/1989	Employee 414009	EX088				6740.5
0031	5/15/1992	Employee 104017	46570	FORGERY COLLECTI	35	K	2712
0033	9/14/1994	Employee 319076	WMS...	WMS BAND 2			5995
0042	9/9/1998	Employee 420346	EX088				3630.5
0044	6/10/1983	Employee 232247	12990	CASH FLOW COORDI	42	K	18.48
0048	12/16/2000	Employee 417323	EX088				5305.75
0049	8/14/2000	Employee 870458	EX088				4330.17
0050	6/10/2002	Employee 977470	09250	ADMIN TRAINEE 1	27	B	10.5
0051	7/6/1999	Employee 423981	12108	FINANCIAL ANALYS	52	K	4115
0054	7/1/1999	Employee 377155	03295	IT APPS SPECIALI	62	K	5266
0073	2/3/1997	Employee 231206	EX088				5355.67
0092	7/1/1999	Employee 576189	03273	IT SYSTEMS SPECI	54	K	4322

Rows: 87

Users can add or delete position records from this listing. Position records cannot be edited in this listing view. The list can be filtered and/or sorted for easier navigation. The list displays the following fields:

- Position Number
- Start Date
- Employee Name (for demo purposes the names have been removed)
- Job Classification
- Job Class Title
- Salary Range
- Salary Step
- Salary

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E. Sort Position Listing

SPS - DV - Position Listing

File Tools Edit View

Position Listing

Position File ID:

100 - February 19th Demo Load

Pos. #	Start Date	Name	J...	Job Title	R...	S...	Salary
0177	1/1/1900	Employee -5	01010	OFFICE ASST	28		0
0177	1/1/1900	Employee -5	01010	OFFICE ASST	28		0
0138	2/11/2001	Employee 737211	01011	OFFICE ASST SR	31	J	2413
0192	3/1/1994	Employee 501305	01012	OFF ASST LEAD	33	K	2586
0195	1/1/1900	Employee -9	01021	SEC SR	33		0
0027	10/5/1999	Employee 427298	01300	PUBLICATIONS SPE	36	K	2775
0197	5/7/1997	Employee 586368	02980	COMP OPER 4	35	K	2712
0211	7/1/1999	Employee 604135	03272	IT SYSTEMS SPECI	50	K	3916
0092	7/1/1999	Employee 576189	03273	IT SYSTEMS SPECI	54	K	4322
0175	7/1/1999	Employee 425099	03274	IT SYSTEMS SPECI	58	K	4771
0184	7/1/1999	Employee 268887	03274	IT SYSTEMS SPECI	58	K	4771
P013	6/25/2002	Employee 851131	03292	IT APPS SPECIALI	50	D	3291
0159	7/1/1999	Employee 303852	03293	IT APPS SPECIALI	54	K	4322
0203	7/1/1999	Employee 232243	03293	IT APPS SPECIALI	54	K	4322
0207	7/1/1999	Employee 502270	03293	IT APPS SPECIALI	54	K	4322
0208	7/1/1999	Employee 350780	03293	IT APPS SPECIALI	54	K	4322
0220	1/17/2002	Employee 210967	03293	IT APPS SPECIALI	54	J	4216
0124	7/1/1999	Employee 496622	03294	IT APPS SPECIALI	58	K	4771
0176	8/8/2000	Employee 417714	03294	IT APPS SPECIALI	58	K	4771

Rows: 87

The position list can easily be sorted by clicking on a column heading.

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F. Open/Update Position

Double clicking on the position line will open a position. There will be a delay the first time opening a position in SPS while the system loads the titles for the various dropdown boxes. Subsequent attempts to open a position will be instantaneous.

Percent	Progr...	Program In...	Approp Index	Org Index	Budget Unit	Project	Sub Sub ...
100			00435	030			

The presentation of the funding grid will change.

Users will not be able to navigate to "next" or "previous" positions in this view. In addition to the Position Listing being used for navigation, a "find position" will exist in the Position Detail screen.

The following fields are new to SPS:

1. Funded – Allows the user to indicate if position is assumed in budget/allotted levels. Projection option exists to excluded non-funded positions from the projection.

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2. Multiplier – Allows users to indicate that multiple positions exist with this information. This feature will allow users to project for positions not yet established (e.g., 20 RN's in new hospital ward).
3. Active – This option will display if the position being viewed is current, past, or future. The field will be displayed based on the date of viewing by comparing the position start and end dates.
4. Salary May Exceed Band – This position will be available when the position is in a WMS or EMS position. Checking this box tells the projection that it is okay to project a salary higher than the band; otherwise the max salary projected will be the band salary.
5. User Defined – This field can be anything the agency wants it to be. Positions and projections can be filtered based on the user of the field.
6. Update Date – A display of the last time the position was saved.
7. More Detail – This button opens up a screen with additional fields that were not displayed on the Position Detail screen due to the limited space. These fields were assumed to be less critical to the position and include extract date, insurance eligibility, medical aid, pay organization, pay code, and risk classification.

G. Add Position



The "key" information for a position is required before position information can be added. The user is then presented with the Position Detail screen.

There will also be a "Transfer Employee" option which will allow the user to move the employee to a new position while keeping the employee name (as displayed) and ID (as retained in background data only) the same.

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SPS - DV -

File Tools Edit View

Position # **0001** Employee Name **Doe, Jane**

2/19/2003 *

Job Class Merit System Job Class Description Working Title Spec. Pay

Range Step Current Salary Rate Retirement Increment Date

End Date Funded Multiplier Active Salary May Exceed Band User Defined

Part Time % Over Time % Update Date

Variable PT Variable OT 2/17/2003 More Detail...

Percent	Progr...	Program In...	Approp Index	Org Index	Budget Unit	Project	Sub Sub ...
0							

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H. *Position Listing Report*

The screenshot shows a Windows-style application window titled "SPS - DV - Reports". It has a menu bar with "File" and "Tools". Inside the window, there are two tabs: "Projection" and "Position", with "Position" currently selected. Below the tabs is a section titled "Select a Report" containing a list box with "Position Listing" selected. To the right of this list box is a "Sort By" section with two radio button options: "By Program Index, Position Number" (which is selected) and "By Position Number (Agency)". Below these options are two checkboxes: "All Positions:" which is checked, and "Position File:" which is followed by a dropdown menu showing "DE1 - Demo Position". A "Preview" button is located to the right of the dropdown menu. At the bottom of the window, a status bar displays the text "Loading 'SPSreports' from 'OFM.BASS.SPS.Reports.dll'." and includes a small icon on the right.

SPS - DV - Reports

File Tools

Projection Position

Select a Report

Position Listing

Sort By

☒ By Program Index, Position Number

☐ By Position Number (Agency)

All Positions: ☒

Position File: DE1 - Demo Position

Preview

Loading 'SPSreports' from 'OFM.BASS.SPS.Reports.dll'.

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I. *Run Projection*

The screenshot shows the 'SPS - DV - Projection' window. The title bar includes a standard Windows icon and the text 'SPS - DV - Projection'. Below the title bar is a menu bar with 'File', 'Tools', 'Edit', 'View', 'Go To', 'Reports', and 'Help'. The main area is divided into a 'Standard' tab and a 'Projection Parameters' section. The 'Projection Parameters' section contains four checkboxes: 'Include increments/merit increases' (checked), 'Include cost of living adjustments (COLA)' (checked), 'Include 6767/salary survey' (checked), and 'Include only positions marked "Funded" in projection results' (unchecked). Below these checkboxes are three dropdown menus: 'Position file id' (set to '100 - February 19th Demo'), 'Biennium' (set to '2003-05'), and 'Starting fiscal month' (set to '01 - July'). At the bottom of the window, a status bar displays 'Projection File ID 100 saved'.

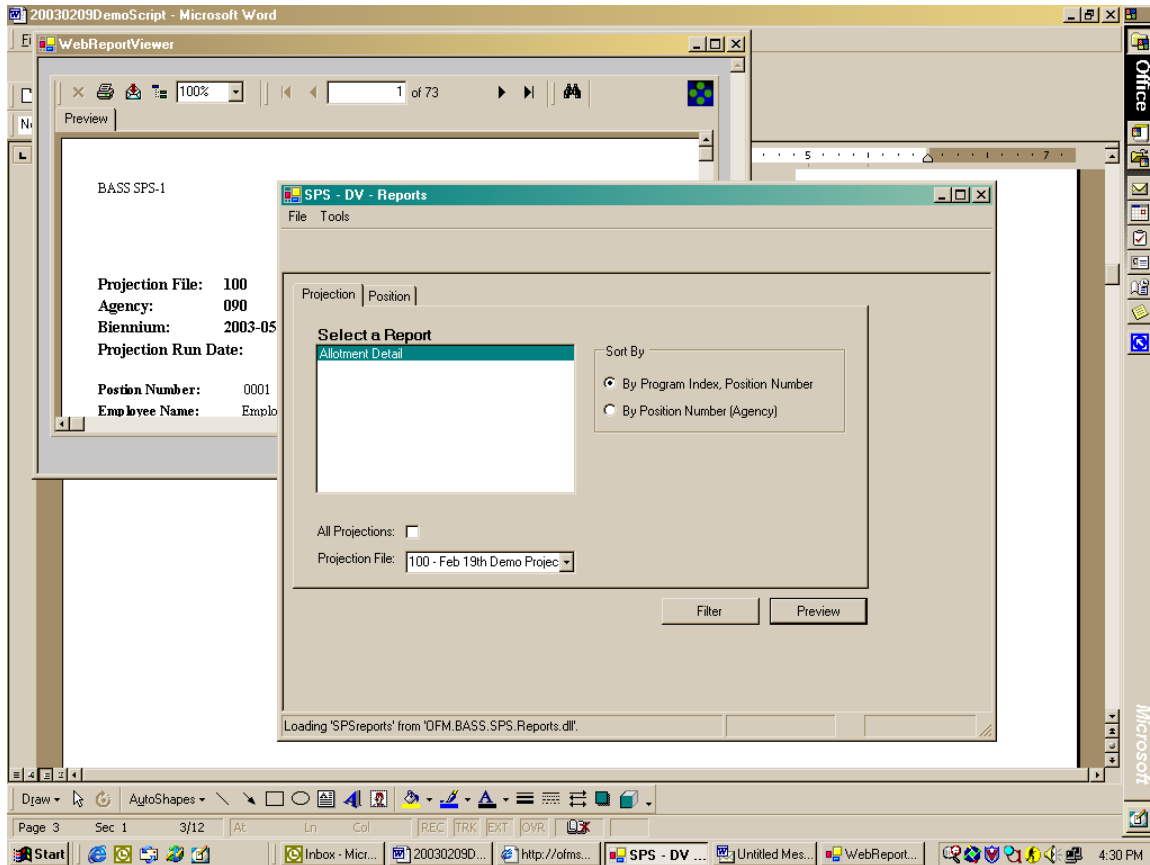
When the starting fiscal month is not FM01 – July, the preceding fiscal months will be projected (or reported) at zero.

The screenshot shows the 'Projection Console - Save Projection' window. The title bar includes a standard Windows icon and the text 'Projection Console - Save Projection'. The main area contains three text input fields: 'Projection file ID' (containing 'DEM'), 'Projection title' (containing 'Demo Saving Projection Results'), and 'Comments' (which is a multi-line text area). At the bottom of the window are four buttons: 'OK', 'Reset', 'Cancel', and 'Spell Check'.

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Projection detail is saved. This allows for continued reporting with the same results into the future and archiving.

J. Allotment Detail Report

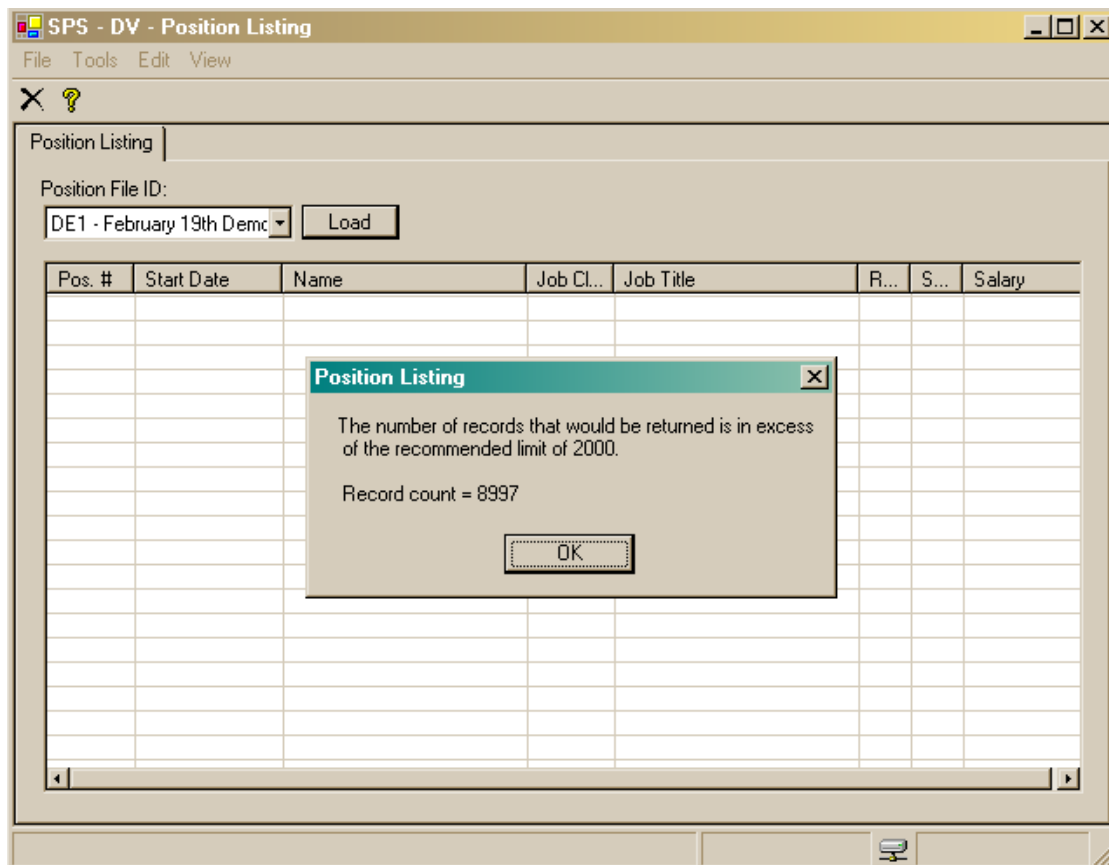


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II. Large Agency

Limitations exist in SPS when an agency has more than 2,000 position records in the DOP Data Warehouse.

A. Position Listing



When an agency has more than *2,000 position records, they will be required to filter the record selection so that the returned list is less than 2,000 positions.

**The 2,000 limit may either increase or decrease as we evaluate the system progress prior to production implementation.*

The Filter will be presented when the user clicks OK.

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B. Filter Position Listing

Filter Options

Account Code Selection | Position Selection Options

Program Index:		Org. Index:	
Program:	100	Division:	
Sub Program:		Branch:	
Activity:		Section:	
Sub Activity:		Unit:	
Task:		Cost Center:	
Aprop. Index:		Project:	
Fund:		Sub Project:	
Appropriation:		Phase:	
		Budget Unit:	

Filter Selections

Program 100;

Record Count Total Records: Invalid: OK Reset Cancel

List can be filtered on any account code option.

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Filter Options

Account Code Selection **Position Selection Options**

Position Number:

Job Class:

Position Funded Flag:

Salary:

User Defined Field:

Position Start Date:

Person Name:

Extract Date:

Update Date:

Filter Selections

Program 100; Job Class 12107;

Additional position filter options exist.

Filter selections are retained through the current session and will be applied to the position list, copy/merge positions, and reports unless cleared.

There will be a help option available to assist users in understanding the functions available in the filter including; equal to, greater than, less than, within a range, and wildcard options.

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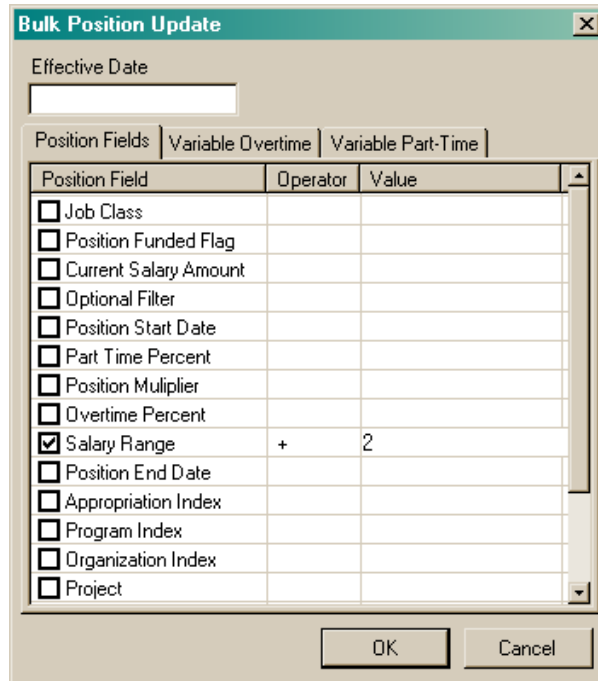
[illegible]

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C. *Update Records in 1-Transaction*



The dialog box titled "Bulk Position Update" features a tabbed interface with three tabs: "Position Fields", "Variable Overtime", and "Variable Part-Time". The "Position Fields" tab is active, displaying a list of fields with checkboxes. The "Salary Range" field is selected with a checked box. The "Operator" column shows a "+" sign, and the "Value" column shows the number "2". Other fields listed include Job Class, Position Funded Flag, Current Salary Amount, Optional Filter, Position Start Date, Part Time Percent, Position Multiplier, Overtime Percent, Position End Date, Appropriation Index, Program Index, Organization Index, and Project. At the bottom of the dialog are "OK" and "Cancel" buttons.

Position Field	Operator	Value
<input type="checkbox"/> Job Class		
<input type="checkbox"/> Position Funded Flag		
<input type="checkbox"/> Current Salary Amount		
<input type="checkbox"/> Optional Filter		
<input type="checkbox"/> Position Start Date		
<input type="checkbox"/> Part Time Percent		
<input type="checkbox"/> Position Multiplier		
<input type="checkbox"/> Overtime Percent		
<input checked="" type="checkbox"/> Salary Range	+	2
<input type="checkbox"/> Position End Date		
<input type="checkbox"/> Appropriation Index		
<input type="checkbox"/> Program Index		
<input type="checkbox"/> Organization Index		
<input type="checkbox"/> Project		

The Update Positions in 1-Transaction feature allows users to update a group of filtered records at one time. In the above example, all positions previously filtered (program 100, job class 12107) will be updated with a new range 2 steps above the current range.

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D. Position File View/Update

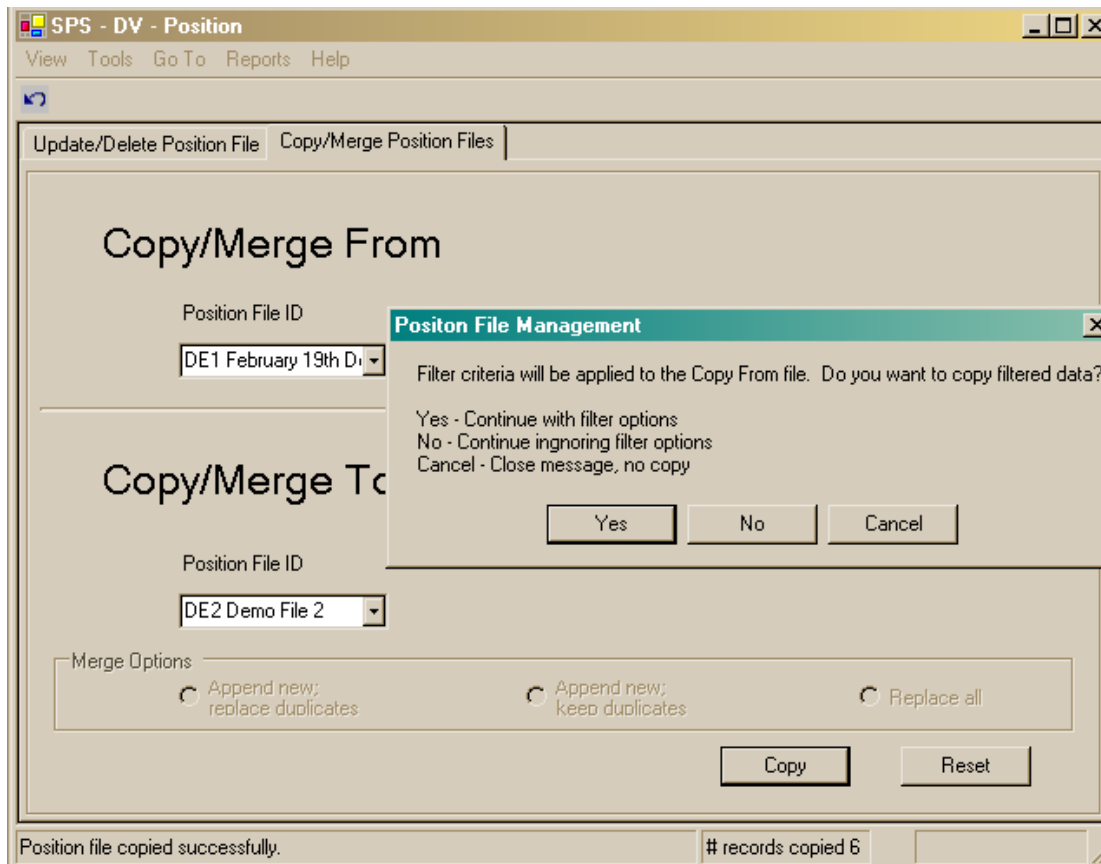
The screenshot shows a Windows-style application window titled "SPS - DV - Position". The menu bar includes "View", "Tools", "Go To", "Reports", and "Help". Below the menu bar are two tabs: "Update/Delete Position File" (selected) and "Copy/Merge Position Files". The main area contains a table with the following data:

	Pos File ID	Title	Operations Loc	Owner Lock	In Use	Comments	Owner
▶	DE1	February 19th De	N	N	N	Demo	Rummig, Vicki
	DE2	Demo File 2	N	N	N		Rummig, Vicki

Below the table is a large, empty, light-brown rectangular area. At the bottom of the window, a status bar displays the text: "Loading 'frmPosition' from 'OFM.BASS.SPS.PositionFile.Client.dll'."

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E. Copy/Merge Position Files



There is no limit on the number of records that can be copied or merged.

Any previously applied filters will be acknowledged in the copy providing options to the user to copy with filter criteria, copy all positions ignoring filter, or canceling the copy process.

Merge Options:

If no records exist in the Copy To file, file is copied. If records do exist in the Copy To file, the following options are available for the user to guide SPS on how to deal with duplicate data.

1. Merge Records/Replace Duplicate –This option will merge Copy From positions matching selected filter criteria with Copy To positions. In the event the same

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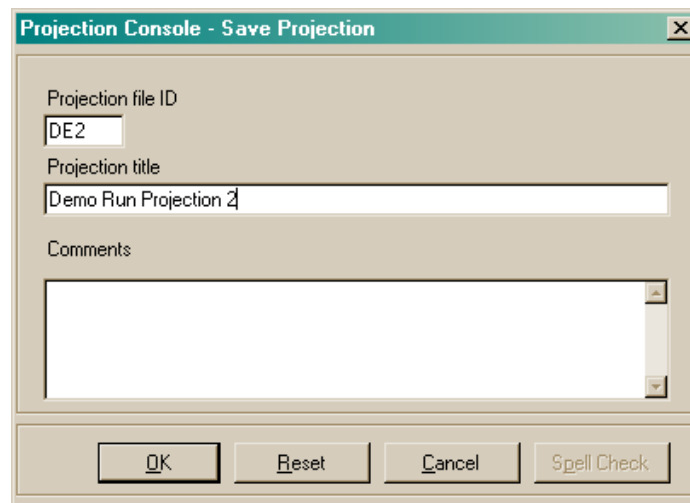
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position/person/effective date exists in both files, the From position will replace the To position. Assumes Copy From file data is accurate.

2. Merge Records/Keep Duplicates – This option will merge Copy From records matching selected filter criteria with Copy To records. In the event the same position/person/effective date exists in both files, the To position will be retained and the From position will be ignored in the merge. Assumes Copy To file data is accurate.
3. Delete Original/Copy File – This option will delete all positions in the Copy To file, then copy From position matching the selected filter criteria.

F. Run Projection

1. There is no limit to the number of records that can be projected.
2. All records of a position file will be included in the projection regardless of filter options.
3. Filter options will apply to projection reports until reset or a new session.



Projection Console - Save Projection

Projection file ID
DE2

Projection title
Demo Run Projection 2

Comments

OK Reset Cancel Spell Check

G. Allotment Detail Report

Salary Projection System

Position Listing Report

Page 2 of
2/18/200
3:58:27PM

Position File: DE1
Agency: 090

Sort By: Position Number

Pos #	Employee Name	Job Class	Job Class Title	Range	Step	Salary	PT %	Start Date	End Date	PRO %	PI	OI	AI	SubObj	Funde
0051	Employee 423981	12108	FINANCIAL ANALYS	52	K	\$4,115	100%	7/6/99		100%	00444		030	AA	Y
0054	Employee 377155	03295	IT APPS SPECIALI	62		\$5,266		7/1/99		100%	00432		030	AA	Y
0073	Employee 231206	EX088				\$5,356		2/3/97		100%	00120		030	AC	Y
0092	Employee 576189	03273	IT SYSTEMS SPECI	54	K	\$4,322		7/1/99		100%	00433		030	AA	Y
0108	Employee 205060	12108	FINANCIAL ANALYS	52		\$4,115		3/1/01		100%	00441		030	AA	Y
0110	Employee 153107	WMS03	WMS BAND 3			\$6,461		7/1/00		100%	00419		030	AA	Y
0119	Employee 421490	WMS02	WMS BAND 2			\$4,601		9/27/94		100%	00435		030	AA	Y
0121	Employee 492855	12106	FINANCIAL ANALYS	44	K	\$3,376		3/3/89		100%	00412		030	AA	Y
0124	Employee 496622	03294	IT APPS SPECIALI	58		\$4,771		7/1/99		100%	00434		030	AA	Y
0125	Employee 750963	EX202				\$8,480		8/2/99		30%	00320		030	AC	Y
										70%	00310		030	AC	Y
0126	Employee 58808							5/1/93		5%	00220		030	AC	Y
										95%	00490		030	AC	Y
0129	Employee 337273	03750	DATA PROC. SUP 3	41	K	\$3,134		4/21/97		100%	00435		030	AA	Y
0137	Employee 376080	12106	FINANCIAL ANALYS	44		\$3,376		1/24/90		100%	00444		030	AA	Y
0138	Employee 737211	01011	OFFICE ASST SR	31	J	\$2,413		2/11/01		100%	00130		030	AA	Y
0139	Employee 386208	12108	FINANCIAL ANALYS	52	K	\$4,115		2/1/94		10%	00220		030	AA	Y
										90%	00210		030	AA	Y
0143	Employee 225487	12107		50		\$3,916		1/28/94		100%	00412		030	AA	Y
0144	Employee -3	13000	CASH FLOW COORDI			\$0		1/1/00		100%	00411		030	AA	Y
0147	Employee 306671	12990		42	K	\$3,215		7/1/88		100%	00411		030	AA	Y
0150	Employee 588635	EX088				\$6,745		9/9/96		100%	00439		030	AC	Y
0153	Employee 417107	12105	FINANCIAL ANALYS	40	K	\$3,059		1/21/92		10%	00210		030	AA	Y
										40%	00220		030	AA	Y

[illegible]

July

Projection Run Date:

Position File:

Postion Number: 0044**Part Time Percent:** 0.60**Job Class:** 12990

Master Index:

Employee Name: Employee 232247

Range: 42 **Step:** K

Organization Index:

Position Start Date: 6/10/1983 12:00:00AM**Termination Date:** 6/30/2005 12:00:00AM**Increment Date:** 12/1/9999 12:00:00AM

Project/Subproj/Phase:

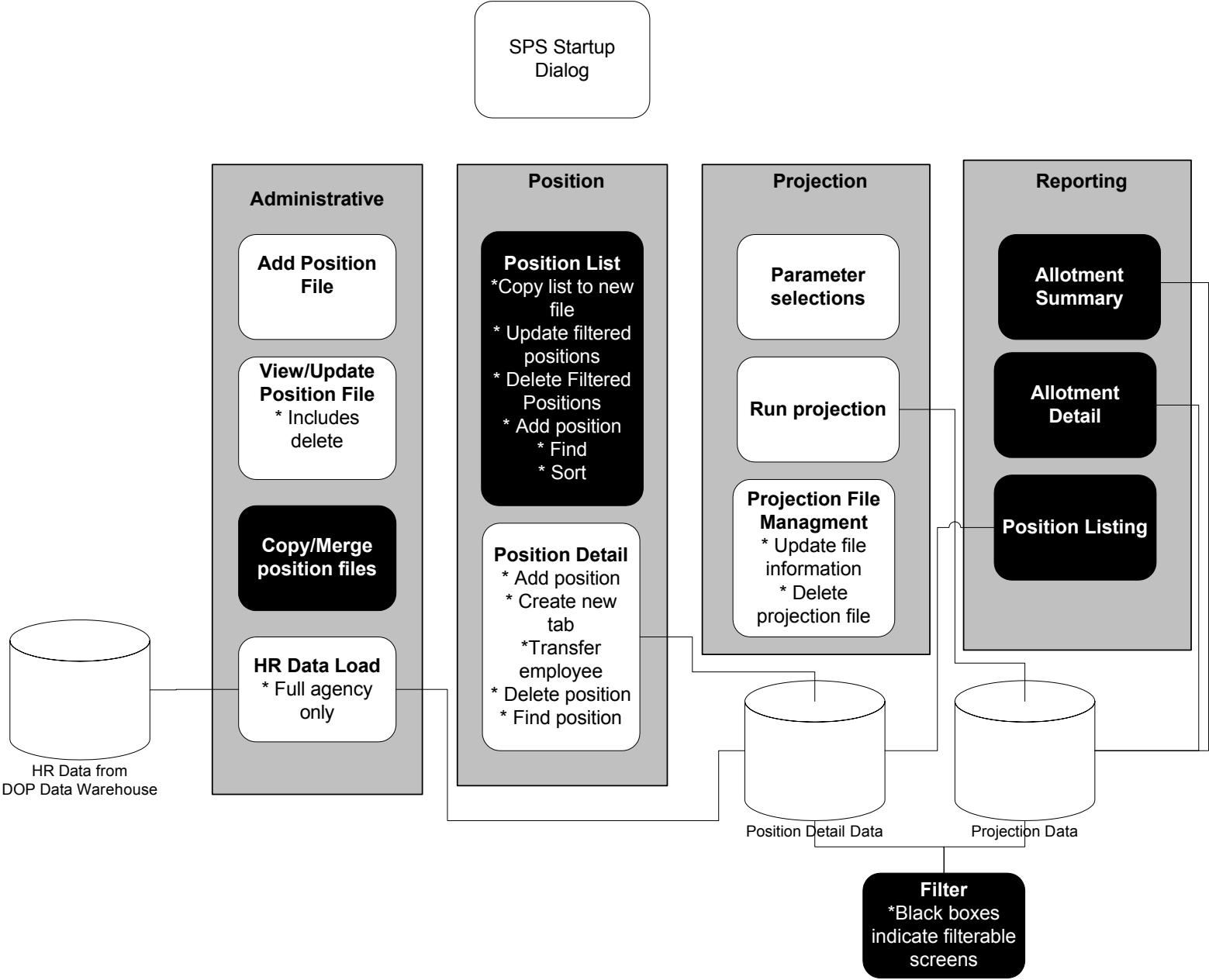
Pay Code: **Retirement:** P1

Fund-AT:

Budget Unit:

Approp. Index:**Proration Percent:**[illegible]

Salary Projection System



Salary Projection System Demonstration Survey

- | | Strongly
Disagree | Somewhat
disagree | Neutral | Somewhat
Agree | Strongly Agree |
|---|----------------------|----------------------|---------|-------------------|----------------|
| 1. This demonstration was worth my time. | 1 | 2 | 3 | 4 | 5 |
| 2. BASS is headed down the right path with SPS. | 1 | 2 | 3 | 4 | 5 |
| 3. How often do you currently use BSP1? | _____ per _____ | | | | |
| 4. Based on the information provided today, is it feasible to expect your agency to transition to using SPS between July and December 2003? | Yes | | | No | |
| 5. If you answered No to 4 above, please describe specifically why. | _____ | | | | |
| | _____ | | | | |
| 6. When do you want to take SPS training? | _____ | | | | |
| 7. When do you expect your next heavy workload for salary projection to be? (month/year) | _____ | | | | |
| 8. For what business function? | _____ | | | | |

Any additional thoughts or comments

Optional Information

Name

Agency